



## **ProperSync 1.3 User Manual**

**Rev 1.2**

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## Overview of ProperSync

### What is ProperSync

ProperSync is an Outlook add-in that exposes SharePoint custom fields within Outlook. ProperSync supports the following items connected to Outlook

- SharePoint Calendars
- SharePoint Tasks
- SharePoint Contacts

### What's new in ProperSync 1.3

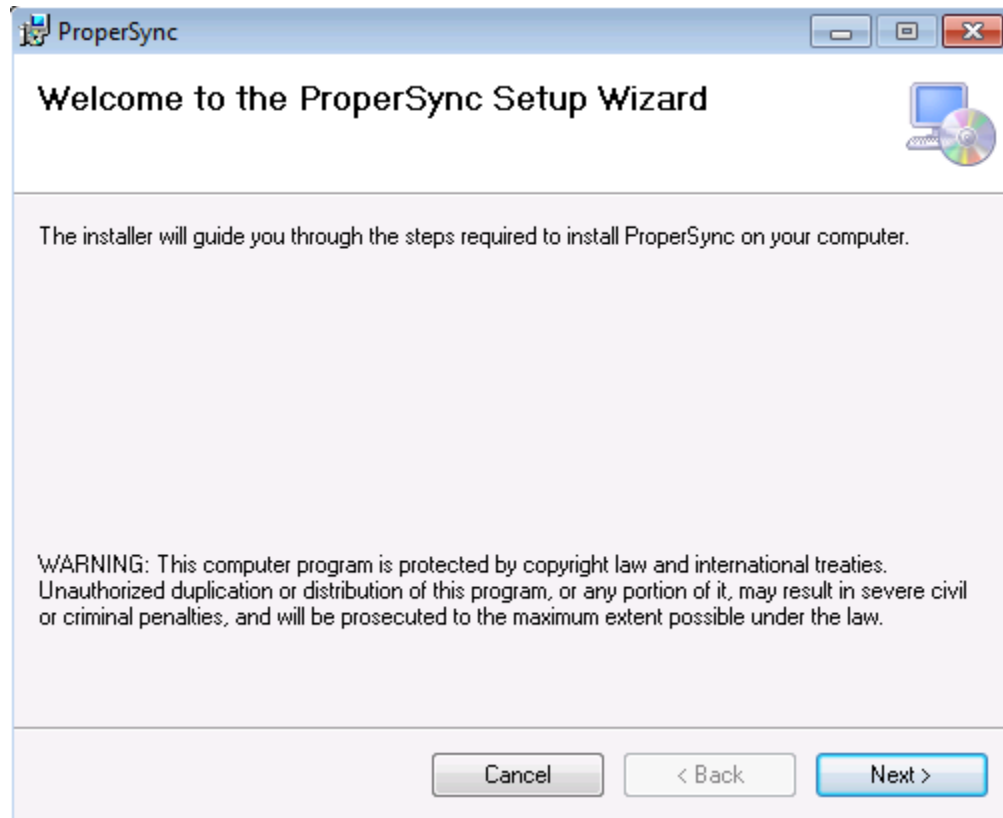
- New Sync Engine
  - a. Fixes Outlook conflict issues with items
- Sync directly to any Outlook Contact, Calendar or Task folder
  - a. Sync your team calendar to your personal calendar
  - b. Sync your contacts to your team SharePoint CRM

## Getting Started

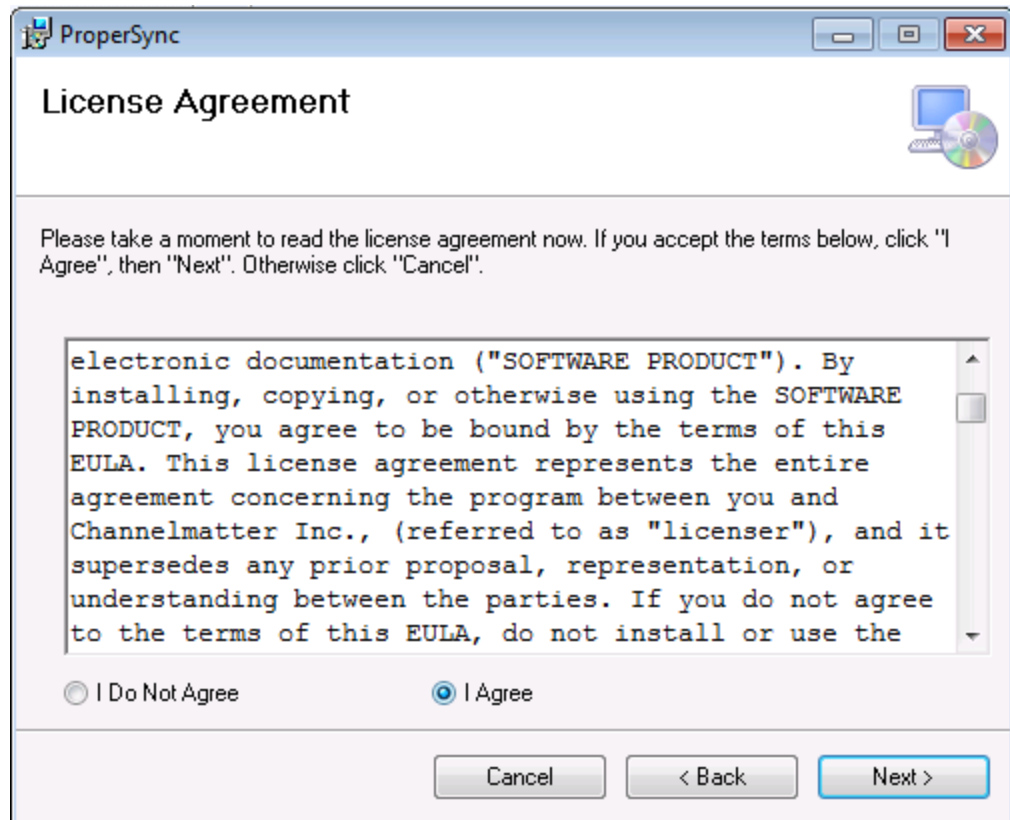
### Installing ProperSync

For individual users, ProperSync has one simple installer. To install ProperSync:

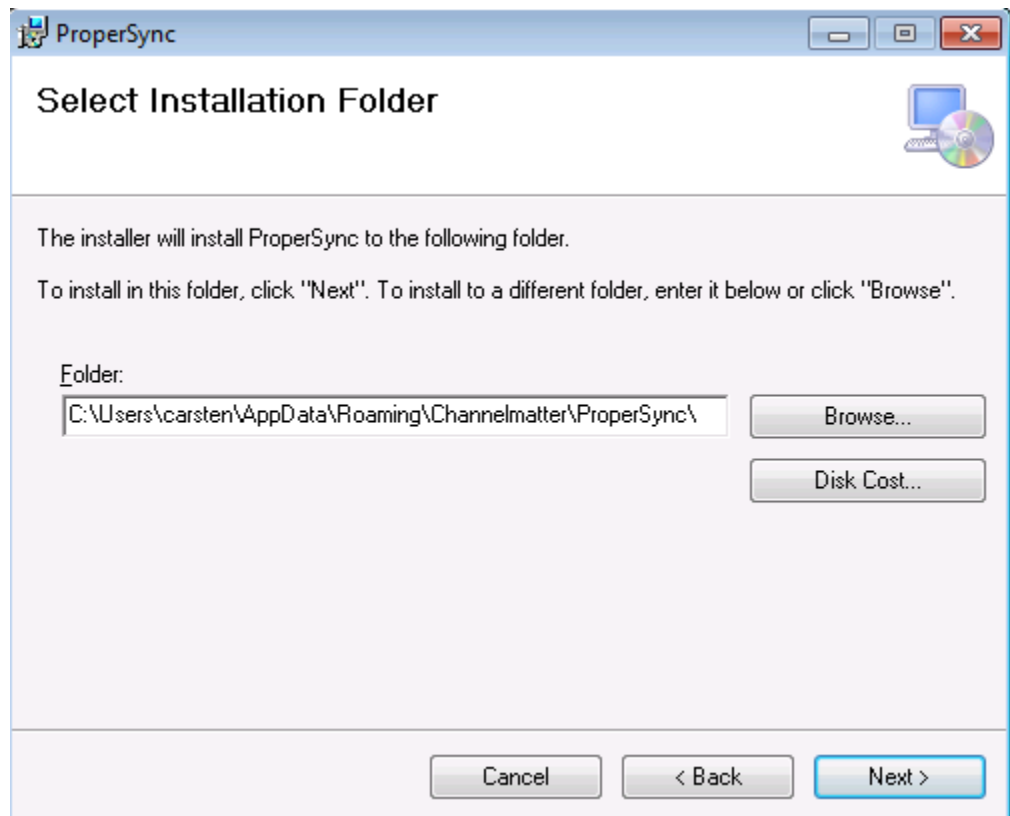
- 1) Close Microsoft Outlook
- 2) Open the ProperSync zip file downloaded from <http://www.propersync.com/downloads.aspx>
- 3) Run the setup.exe file
- 4) Click **Next** from the main screen



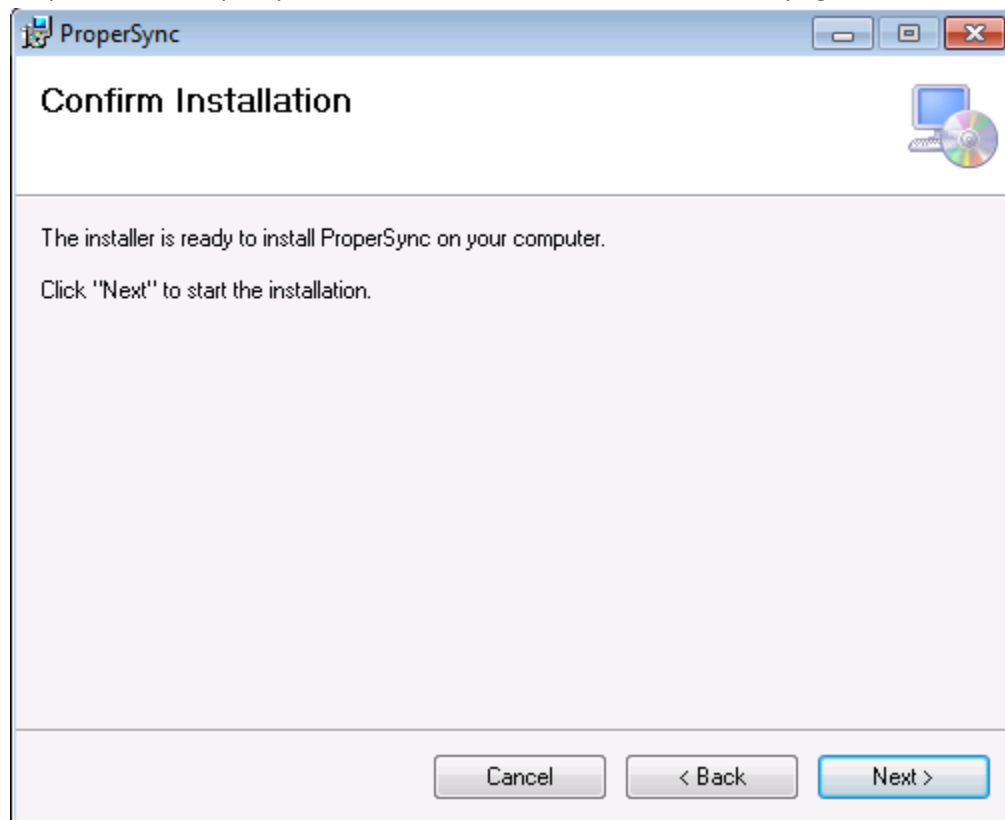
- 5) Read the **License Agreement**, if you agree with the terms, click on the **I Agree** radio button, then click **Next**



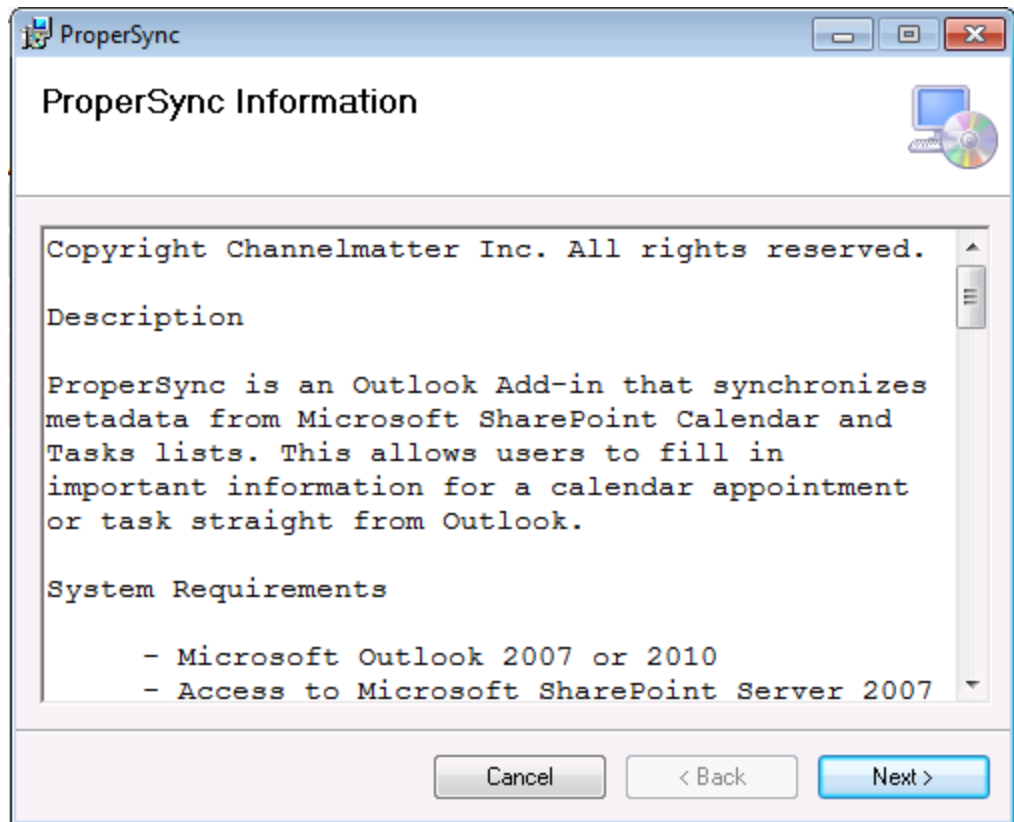
- 6) Verify the **Install Folder** is correct, use the **Browse** button if you wish to correct it, then click **Next**



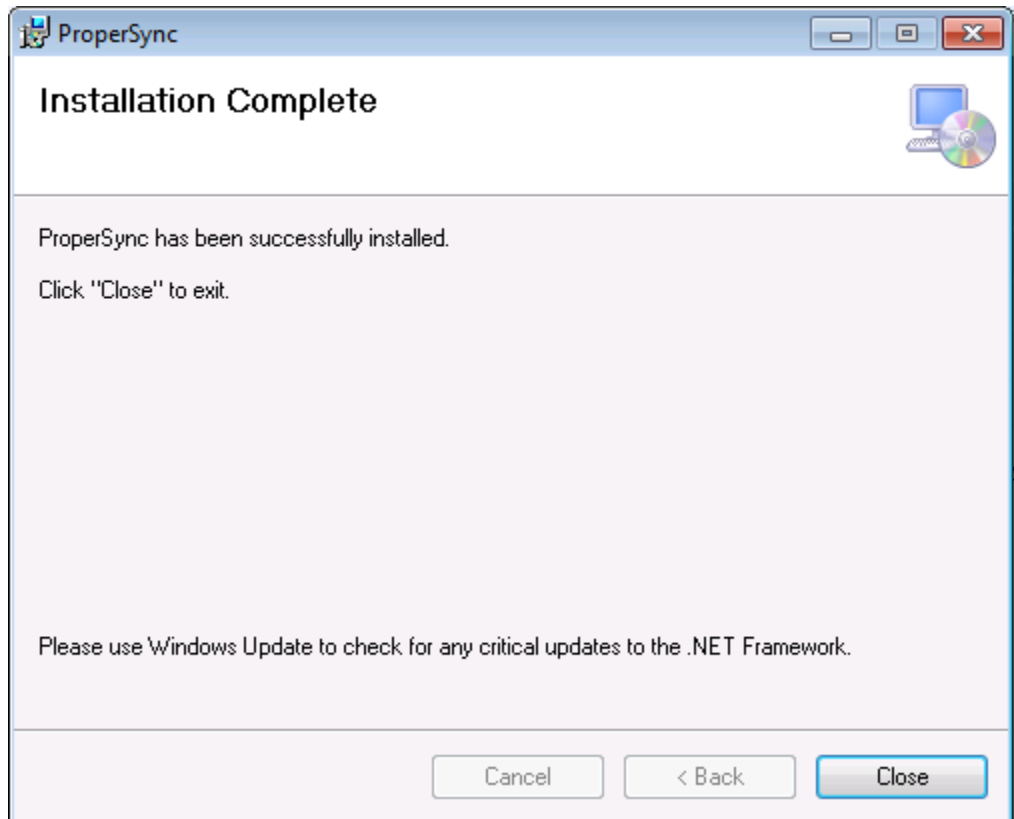
- 7) When ready to **Install** ProperSync, click **Next** on the **Confirm Installation** page



- 8) The ProperSync installer will complete the installation of ProperSync on your machine. When the installation is complete the **ProperSync Information** screen will appear



- 9) Click **Next** after reading the ProperSync ReadMe information



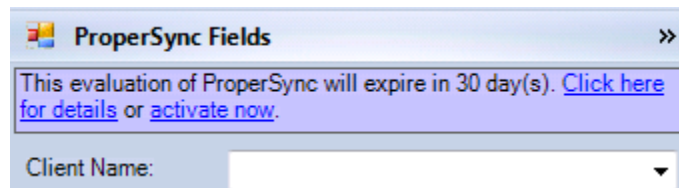
- 10) The installation is now complete. Press **Close** to close the installer

## Activating ProperSync

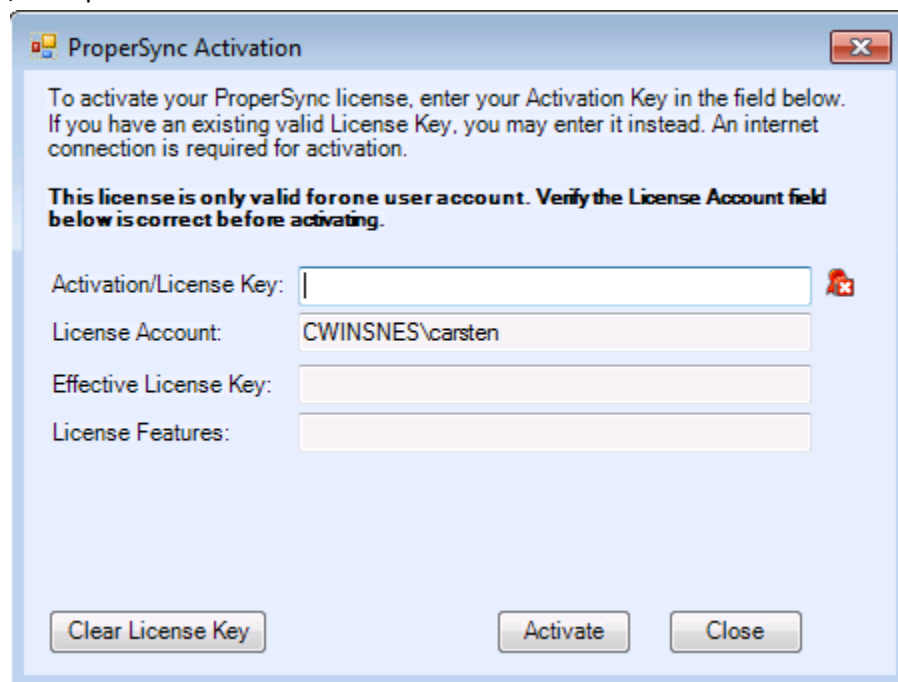
ProperSync can be activated directly within an Outlook appointment item or task. It can also be activated within the ProperSync settings area.

### To activate ProperSync within an Outlook appointment or task item

- 1) Open Microsoft Outlook
- 2) Browse to a SharePoint calendar or task list within Outlook
- 3) **Open an item** from the list or select **New Item** from the Outlook menu
- 4) On top of the **ProperSync Pane**, click the **Activate Now** link on the top of the ProperSync Fields pane (if this link is not present, then ProperSync is already activated)

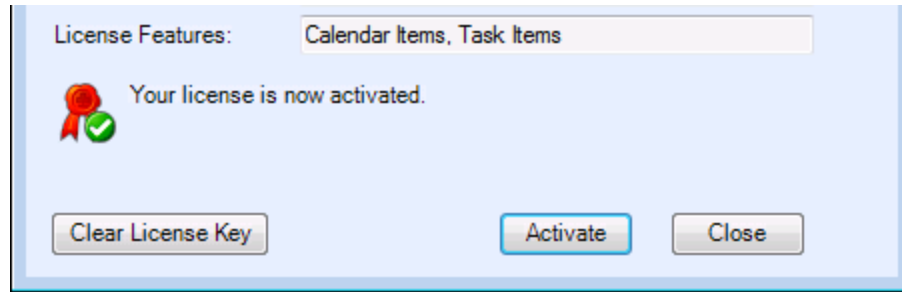


- 5) The **ProperSync Activation** window will open. Enter your **license key** in the **Activation/License Key** box, then press **Activate**.



- 6) Once the key is properly activated, a response will be appear in the blank space



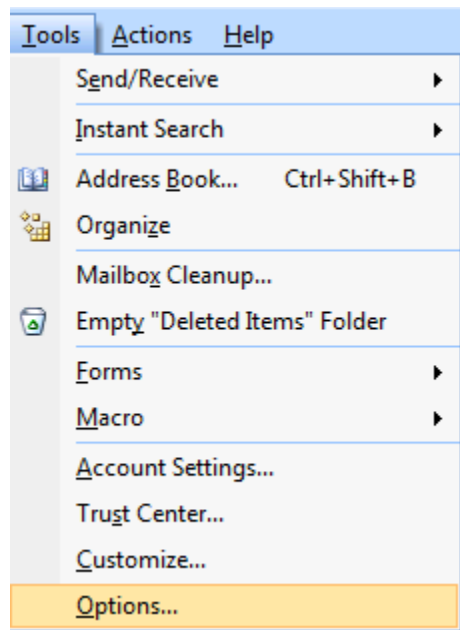


- 7) Click **Close** to close the **ProperSync Activation** dialog box

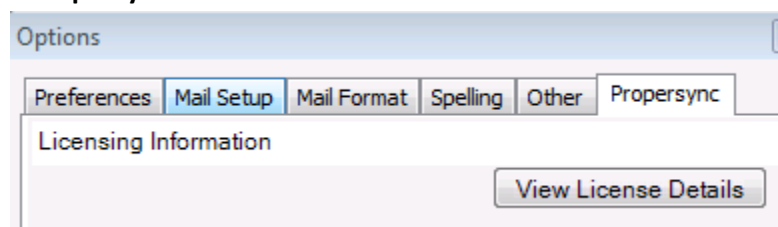
## To Activate ProperSync from Add-in Options

### Outlook 2007

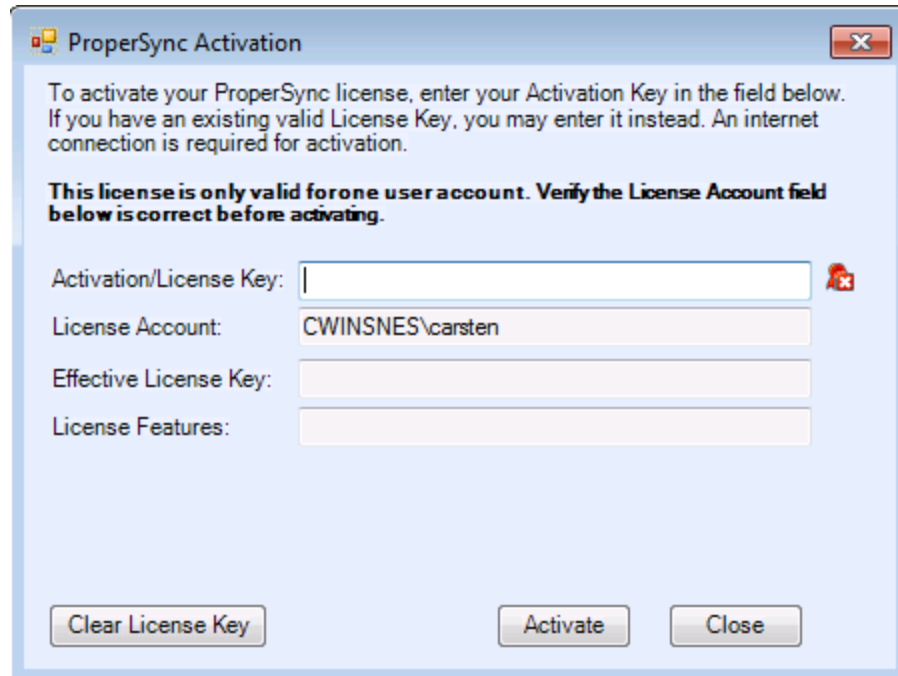
- 1) Open Microsoft Outlook 2007
- 2) From the **Tools** menu select **Options**



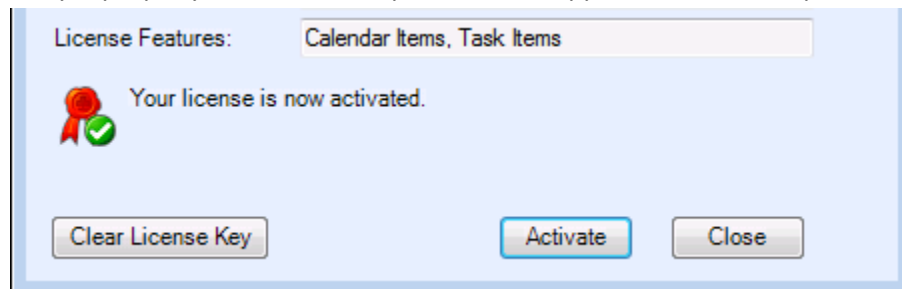
- 3) From the **Options** dialog box select the **ProperSync** tab
- 4) From the **ProperSync** tab select **View License Details**



- 5) The **ProperSync Activation** window will open. Enter your **license key** in the **Activation/License Key** box, then press **Activate**.



- 6) Once the key is properly activated, a response will be appear in the blank space



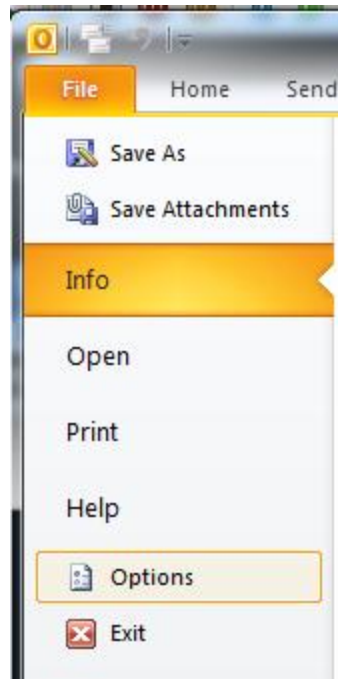
- 7) Click **Close** to close the **ProperSync Activation** dialog box

### **Outlook 2010**

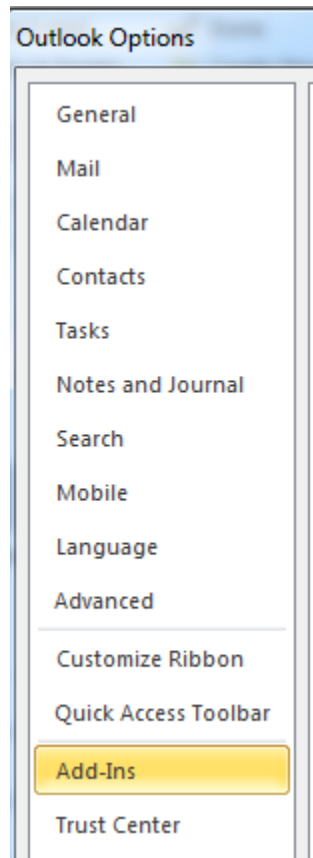
- 1) Open Microsoft Outlook 2010
- 2) **Click** on the **File** button



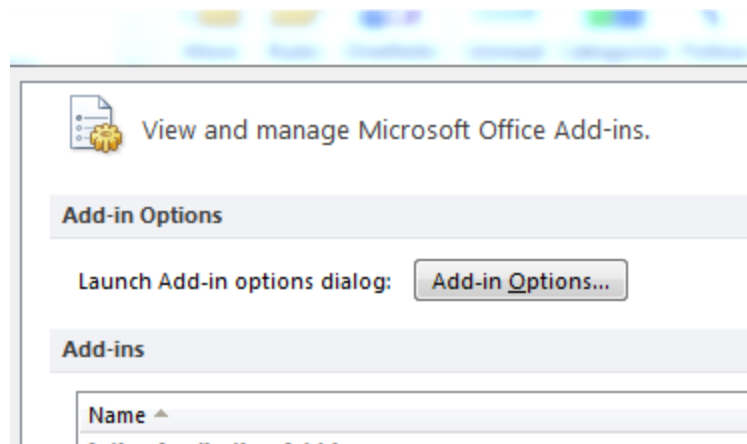
- 3) From the **File** menu select **Options**



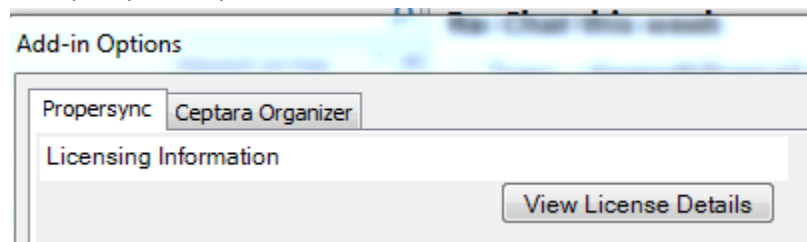
4) From the **Options** dialog box select **Add-ins**



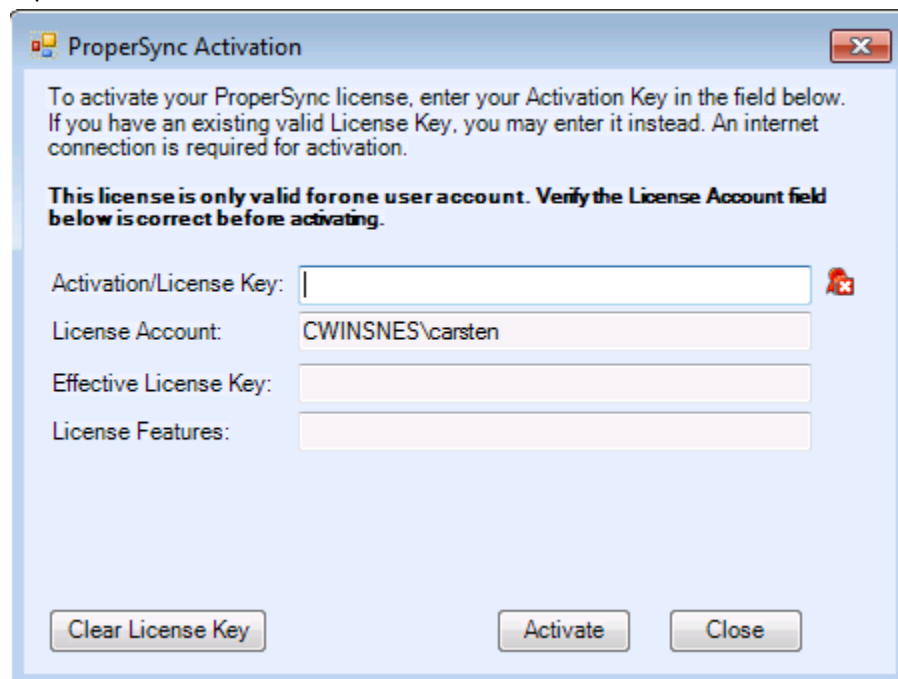
5) From the Add-ins sections select **Add-in Options...**



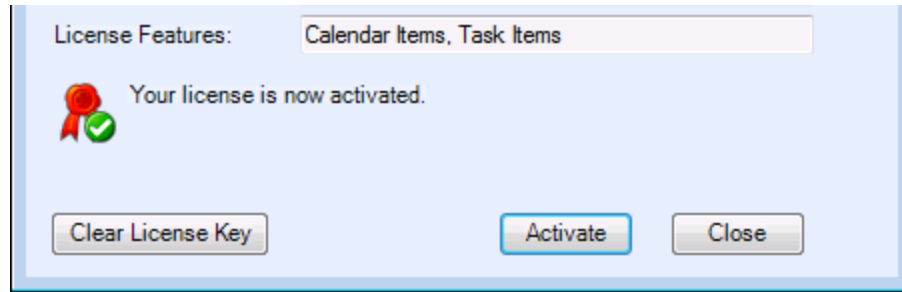
- 6) From the **Add-ins Options** dialog box select the **ProperSync** tab
- 7) From the ProperSync tab press the **View License Details** button



- 8) The **ProperSync Activation** window will open. Enter a **license key** in the **Activation/License Key** box, then press **Activate**.



- 9) Once the key is properly activated, a response will be appear in the blank space



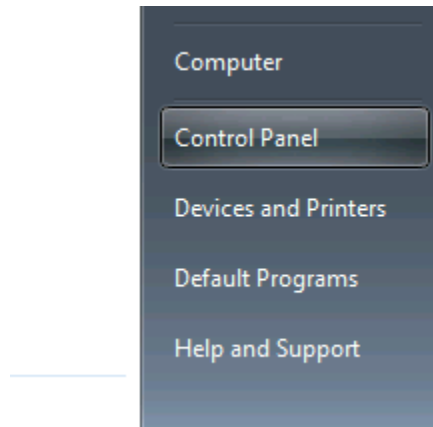
10) Click **Close** to close the **ProperSync Activation** dialog box

## Uninstalling ProperSync

To uninstall ProperSync, use the default Windows uninstall process

### Windows 7 & Vista Users

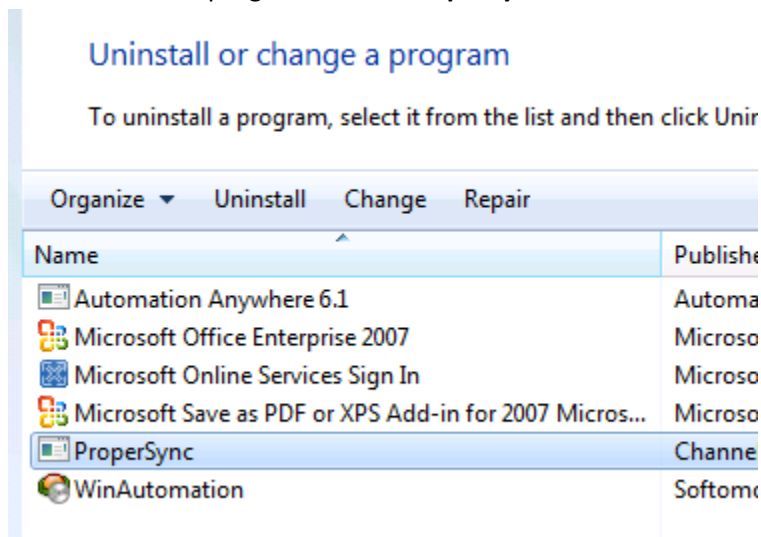
- 1) Close Microsoft Outlook
- 2) Click the **Start Menu** and select **Control Panel**



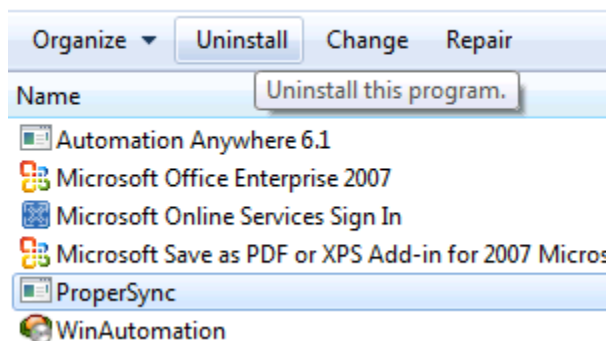
- 3) From the **Control Panel** select **Uninstall a Program**



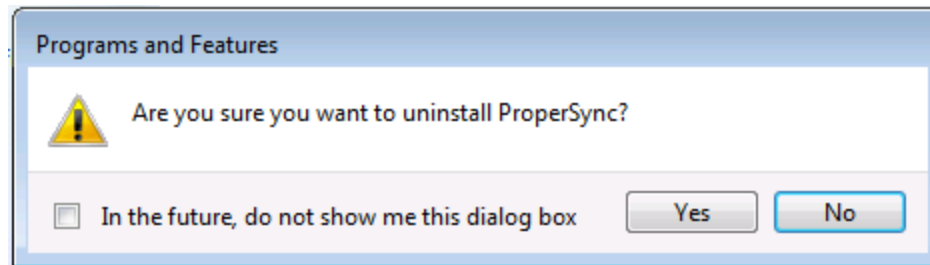
- 4) From the list of installed programs select **ProperSync**



- 5) From the menu select **Uninstall**



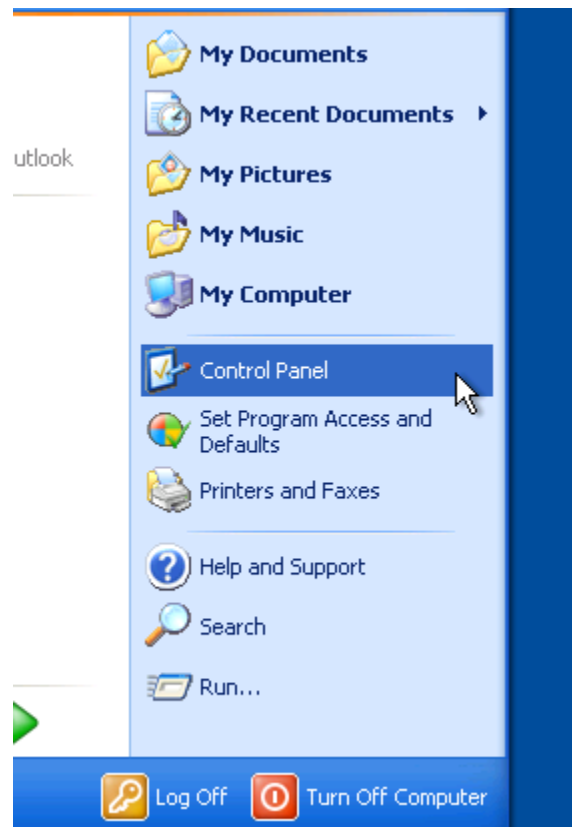
- 6) From the dialog box press **Yes**



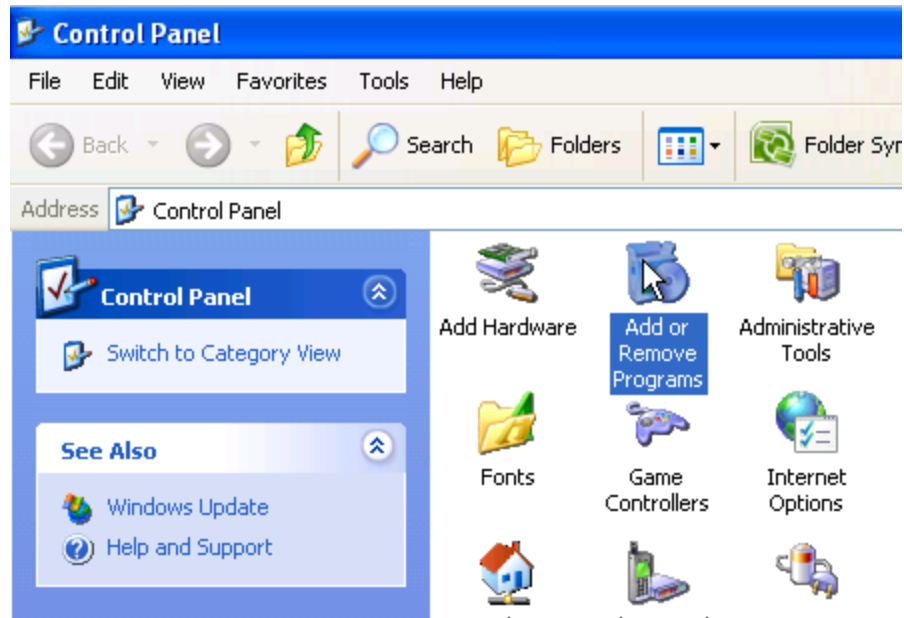
- 7) ProperSync will be uninstalled from the system

### Windows XP Users

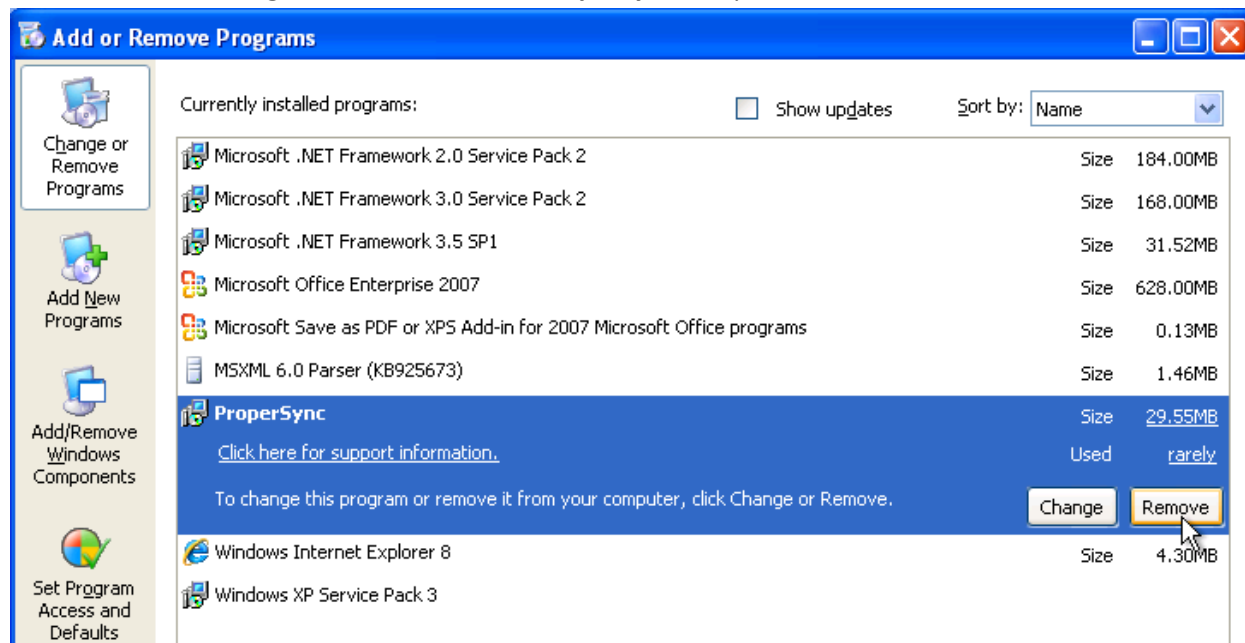
- 1) Close Microsoft Outlook
- 2) From the **Start Menu** select **Control Panel**



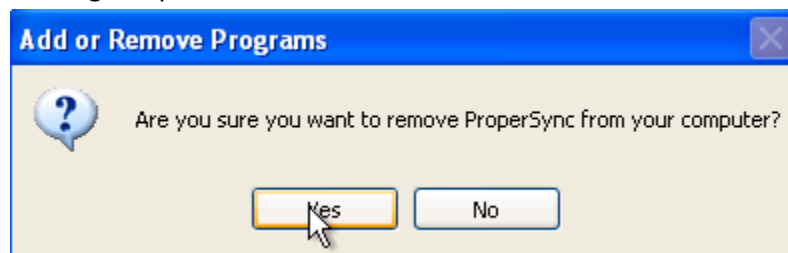
- 3) From the **Control Panel** select **Add or Remove Programs**



- 4) From the **Add or Remove Programs** windows select **ProperSync** and press **Remove**



- 5) From the dialog box press **Yes**



- 6) ProperSync will be uninstalled from the machine



## Basics

### Manage Outlook & SharePoint Connections

Users with Microsoft Outlook can attach any SharePoint calendar or task list they have permission to see. This is a simple client side operation that brings the functionality of SharePoint directly to your desktop.

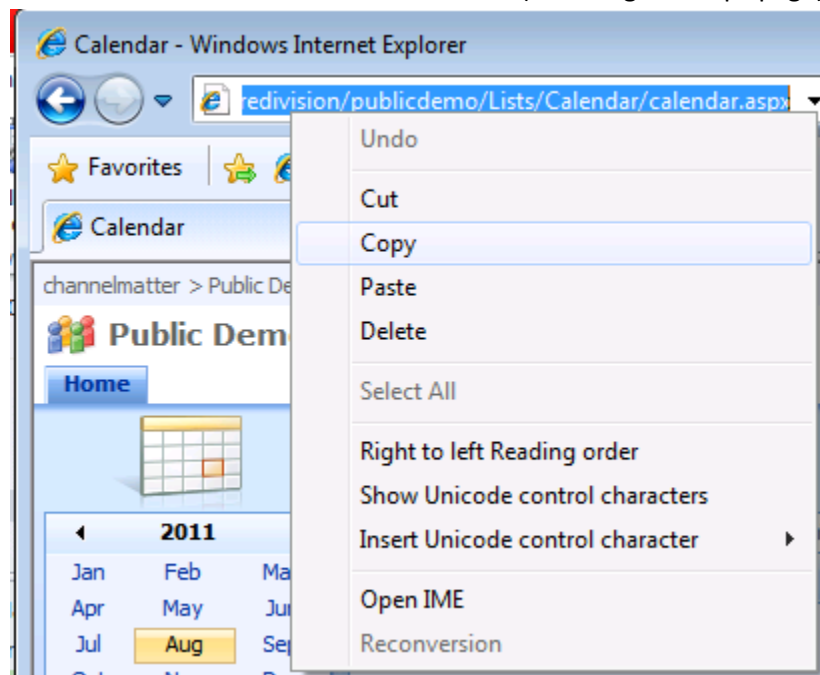
Why connect SharePoint calendars and tasks to your Outlook client?

- Reminders on team events from team calendars in SharePoint
- SharePoint tasks appear in the Outlook to-do list
- Reminders on tasks from SharePoint tasks lists
- Bring your SharePoint calendars and tasks offline
- View/Update your team calendars directly from Outlook, no need to open a browser
- Drag and drop calendar items
- Copy items to your personal calendar

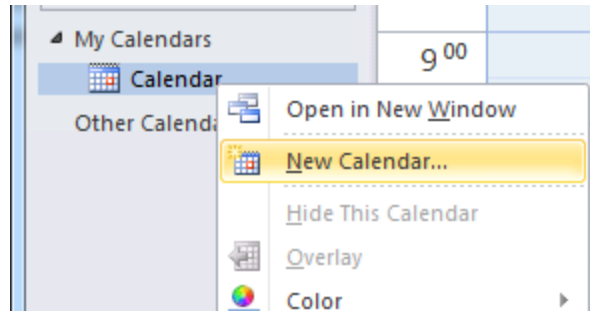
### Connect a SharePoint 2007 or 2010 List to Microsoft Outlook

To connect a SharePoint calendar or task list to Microsoft Outlook

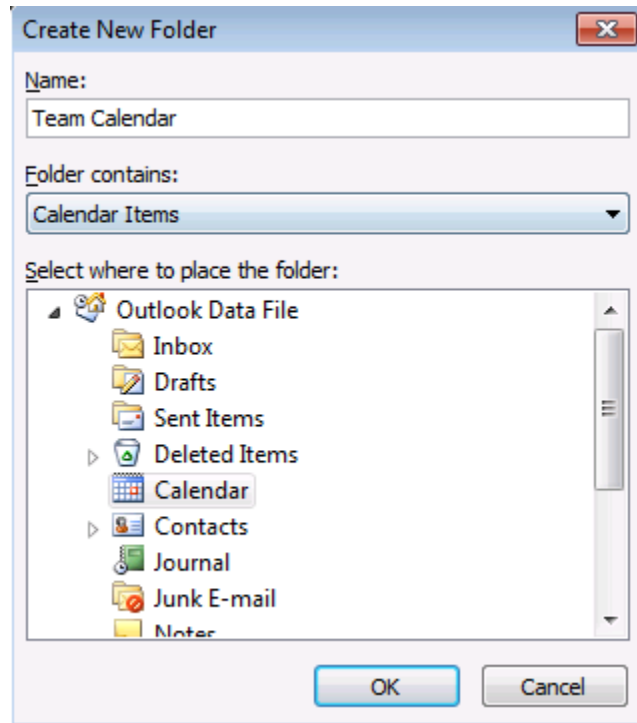
1. Open a web browser and browse to your SharePoint calendar
2. Copy the entire URL from the browser address bar (including the .aspx page)



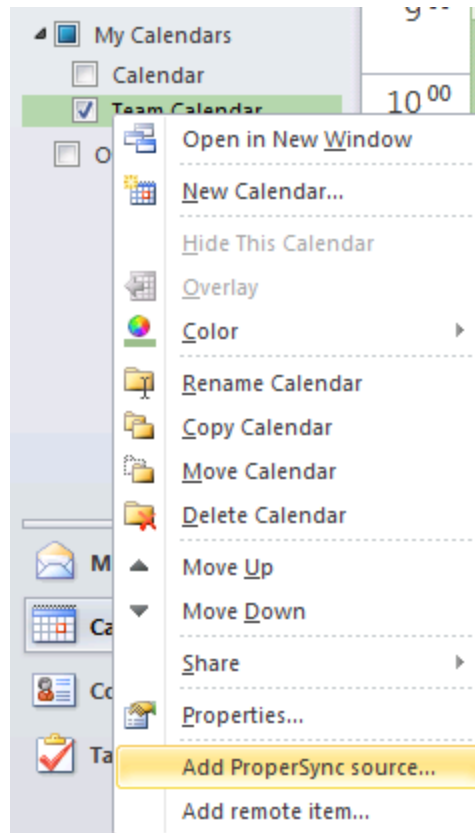
3. Open Microsoft Outlook, browse to your calendar.
4. Right click on **Calendar** and choose **New Calendar** from the context menu



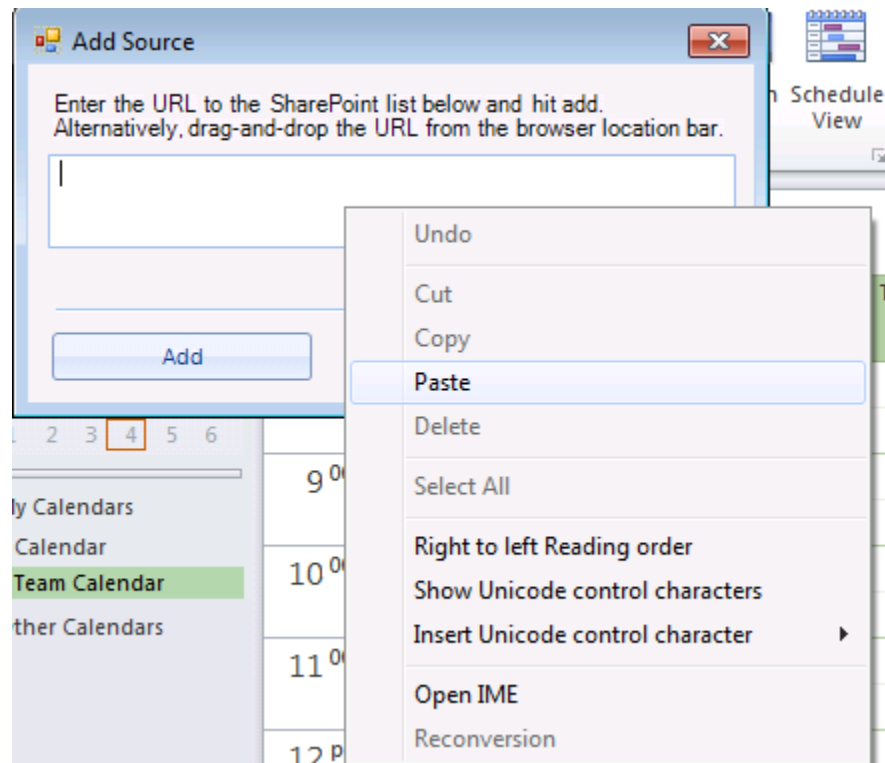
5. Give the new calendar a name (e.g. Team Calendar). Press **OK**.



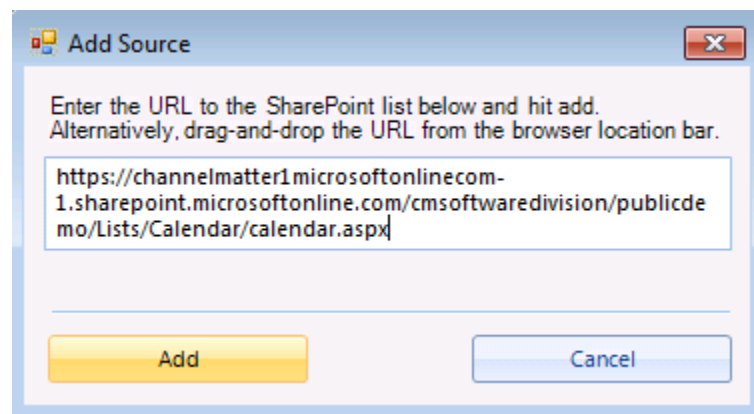
6. Right click on the new calendar (e.g. Team Calendar) and select **Add ProperSync source...**



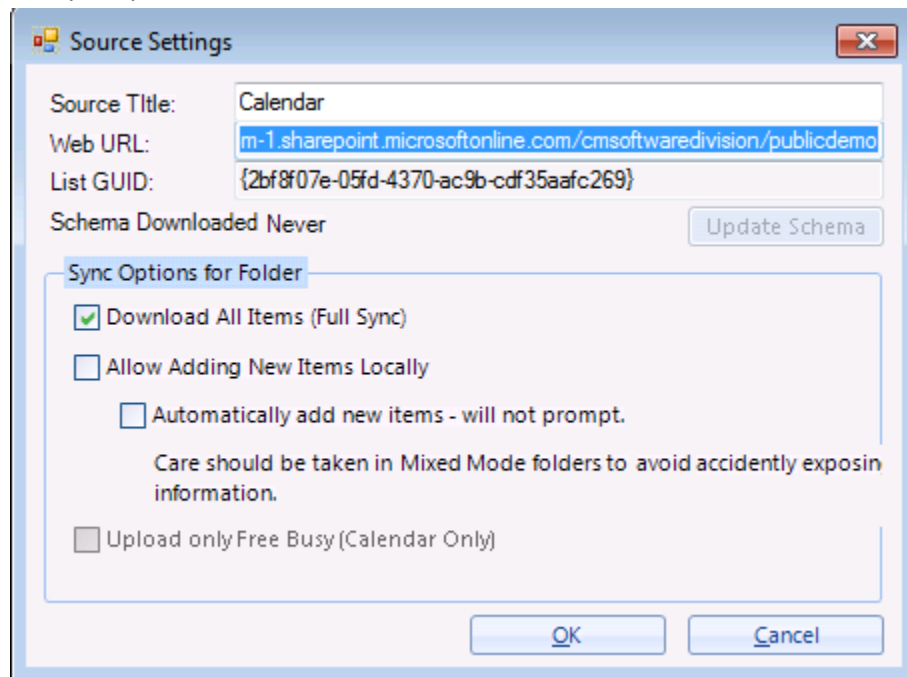
7. Paste the URL in to the **Add Source** box



8. Press **Add**



9. Choose the sync option for the list



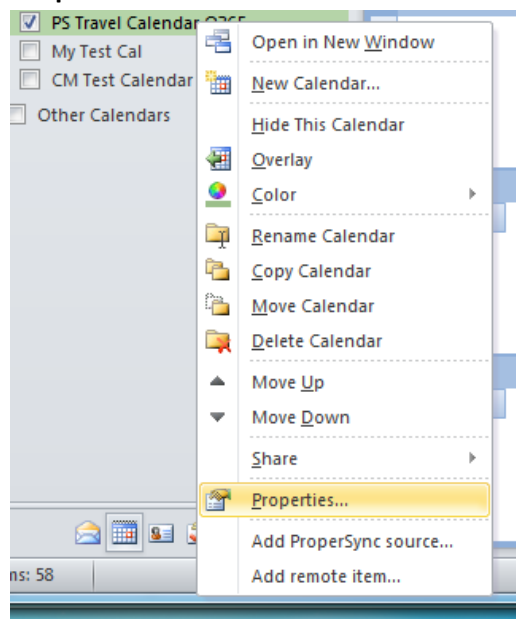
10. Press **OK**

The following steps can be used for Tasks and Contacts as well. Simply browse to your task or contact list in a web browser, copy the link, switch to your Outlook task or contact area and follow the steps above.

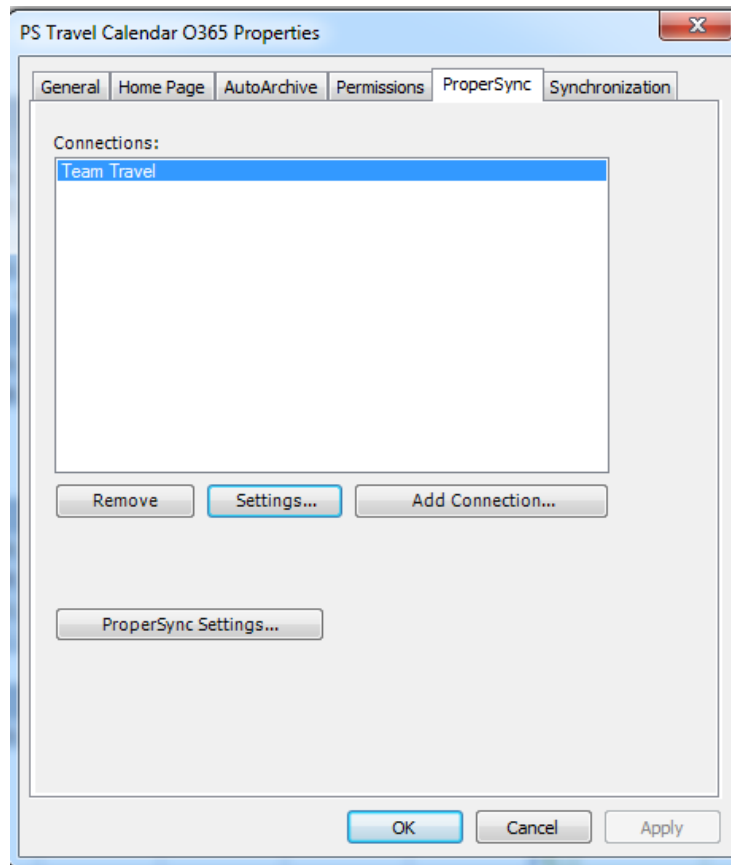
### Remove Connection to a SharePoint List

To remove a connection to a SharePoint list:

- 1) Right click on the Outlook folder, in which the connection should be removed
- 2) Click on **Properties** in the context menu



- 3) Click on the **ProperSync** tab in the window that appears

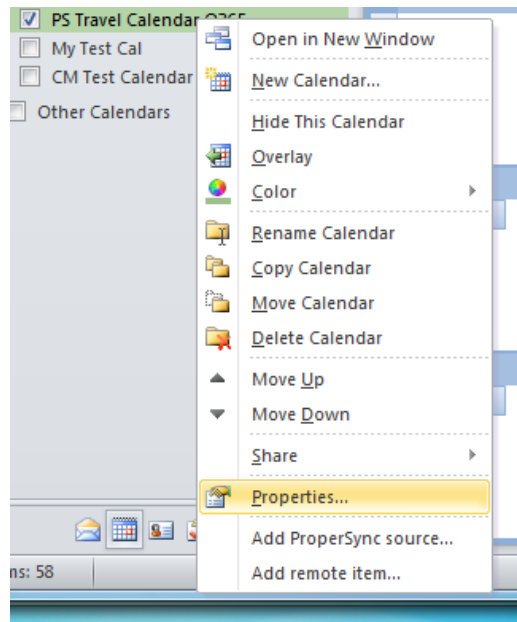


- 4) Select the connection to remove
- 5) Press **Remove** to remove the connection
- 6) Press **OK** to save the settings

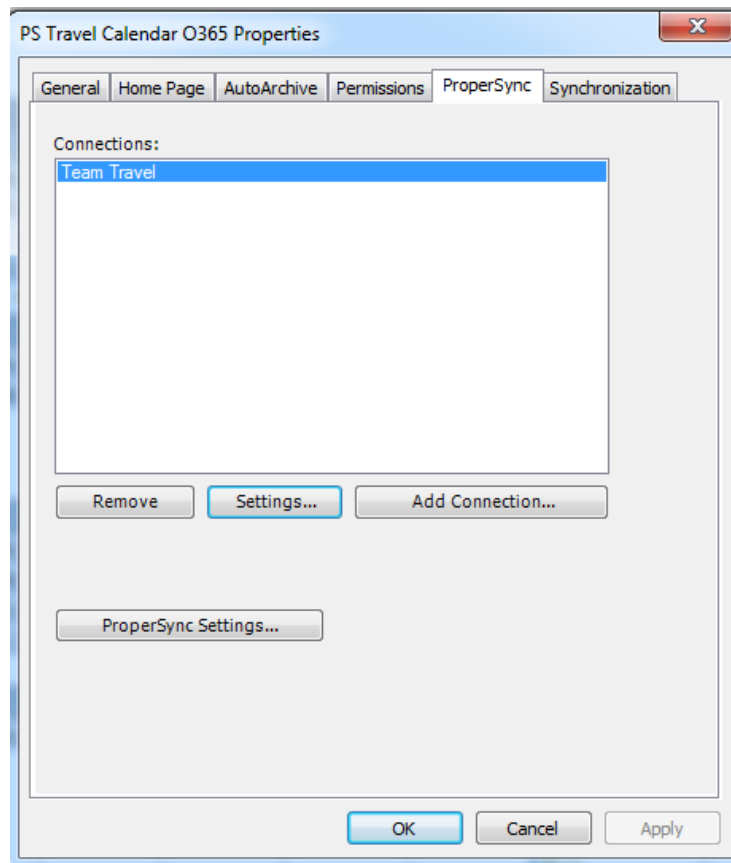
### Modify a Connection on an Outlook folder

To modify a current connection on an Outlook folder:

- 1) Right click on the Outlook folder, in which the connection should be removed
- 2) Click on **Properties** in the context menu



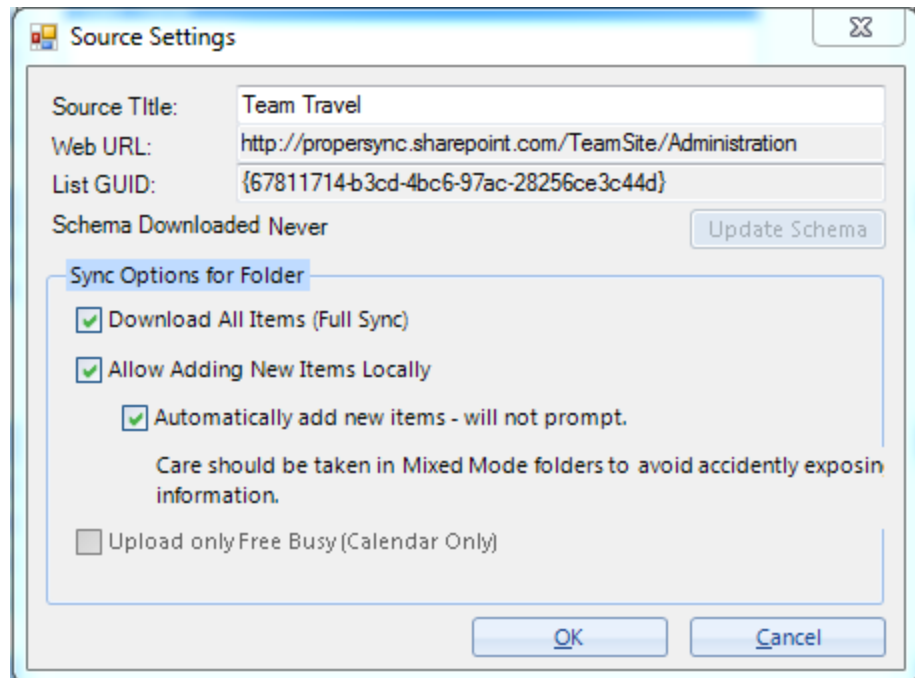
3) Click on the **ProperSync** tab in the window that appears



a.

4) Select the connect to modify then press **Settings**

5) In the **Settings** dialog box, modify the settings, then press **OK**



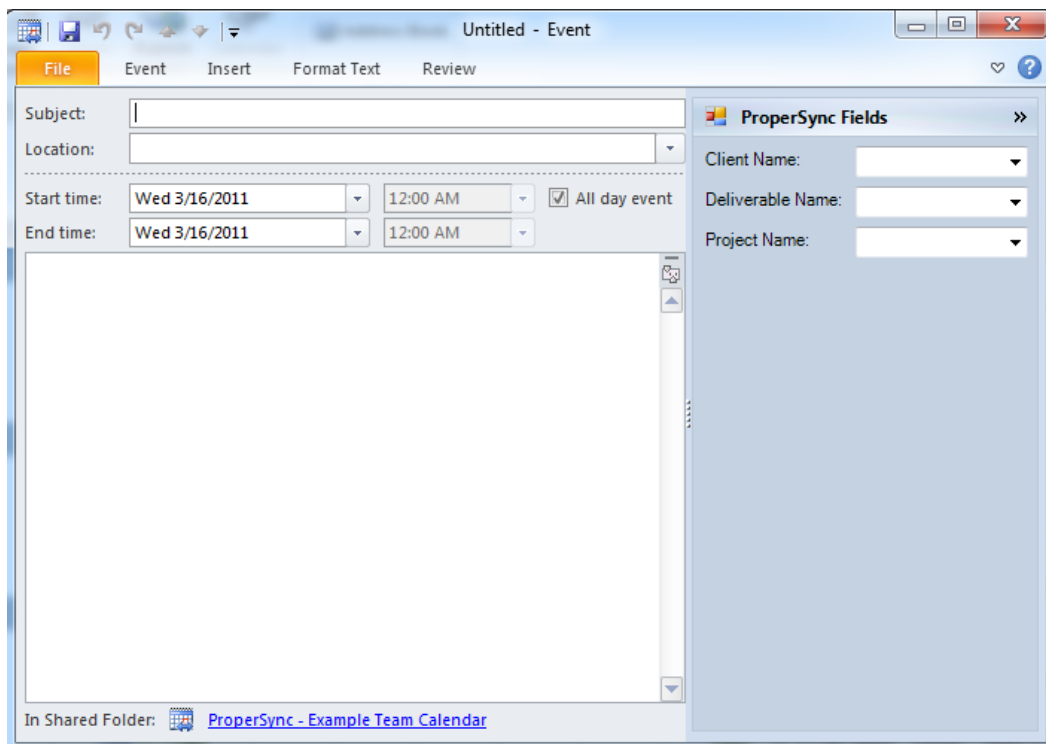
a.

6) Press **OK** in the Properties dialog box to save the settings

### Viewing ProperSync Fields in Outlook

To view the custom columns on a SharePoint list, simply open a task or appointment from a SharePoint list, after ProperSync has been installed.

ProperSync pane in an appointment item:





ProperSync pane in a task item:

The screenshot shows a software interface for managing tasks. The main window is titled "Untitled - Task" and has a menu bar with "File", "Task", "Insert", "Format Text", and "Review". Below the menu bar, there are several input fields: "Assigned To..." (text box), "Subject:" (text box), "Start date:" (dropdown menu with "None" selected), "Status:" (dropdown menu with "Not Started" selected), "Due date:" (dropdown menu with "None" selected), "Priority:" (dropdown menu with "Normal" selected), and "% Complete:" (text box with "0%"). There is also a "Reminder:" section with a checkbox and two dropdown menus. Below these fields is a large text area. At the bottom of the window, it says "In Shared Folder: ProperSync - Example Task List". On the right side, there is a sidebar titled "ProperSync Fields" with a double arrow icon. It contains three fields: "Project Name:" (dropdown menu), "# of Hours Remaining:" (text box), and "Level of Difficulty:" (dropdown menu).

## Supported ProperSync Field Types

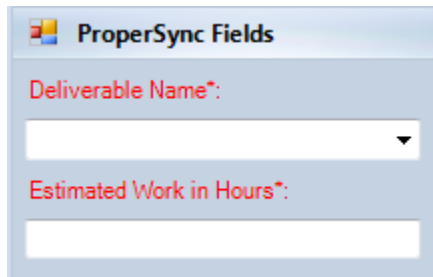
The ProperSync 1.3 supports the following field types:

- Single Line of Text
- Multiple Lines of Text (Plain Text)
- Choice (Drop Down)
- Choice (Radio Buttons)
- Choice (Checkboxes)
- Number
- Number (Percentage)
- Currency
- Lookup
- Date/Time
- User & Groups - Users Only
- Calculated Columns

## Required Fields in Outlook

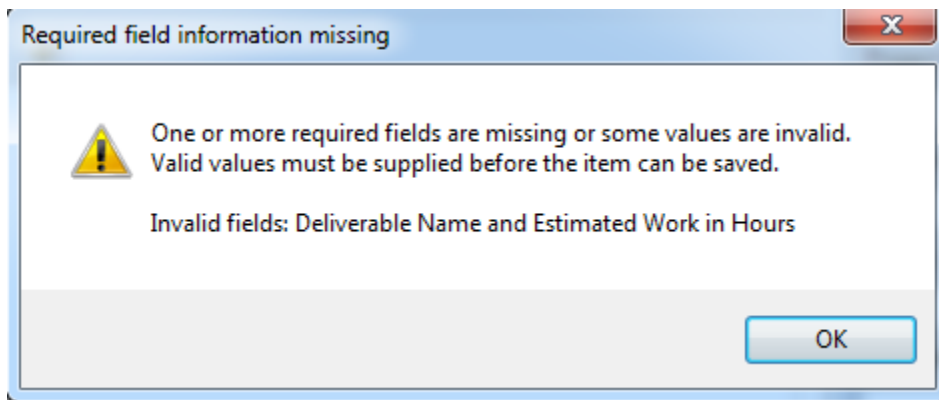
ProperSync will enforce required fields within the Outlook item. Required fields are indicated with a red text. If a user tries to save the item without filling out the required information ProperSync will alert the user of the required fields.

Required fields in the ProperSync Pane:



The image shows a dialog box titled "ProperSync Fields". It contains two required fields, both marked with a red asterisk. The first field is "Deliverable Name\*", which is a text box with a dropdown arrow on the right. The second field is "Estimated Work in Hours\*", which is a text box. The dialog box has a light blue header and a white body.

ProperSync prompt for missing fields:



Note: ProperSync only enforces the required fields that appear in Outlook. The fields that appear in Outlook can be controlled by list administrators. If a list administrator hides a required field from ProperSync, ProperSync cannot enforce the field. To control which fields are provided to ProperSync, refer to [Controlling Fields in Outlook](#), later in this documentation.

## Customizing ProperSync

### Sync Options Explained

There are a few different sync options available for ProperSync 1.3. Please see the definitions below:

- Download All Items (Full Sync)
  - Checking this box will download all items from the SharePoint list. Modifications made to those items will be updated in SharePoint. The new item must exist in SharePoint, new Outlook items will not be updated in this mode
- Allow Adding New Items Locally
  - This allows users to publish some or all of their items to the SharePoint list. To publish to the connected SharePoint list, open the item and click on the **Link To Remote** button in the ribbon.
- Automatically add new items – will not prompt.
  - This will sync all items on your calendar with SharePoint. All the information will be show in the list.

### Example Sync Scenarios

- Only download SharePoint Items
  - Check **Download All Items (Full Sync)** only
- Only upload some of my items
  - Check **Allow Adding New Items Locally** only
- Only upload all my items
  - Check both **Allow Adding New Items Locally & Automatically add new items – will not prompt**
- Synchronize my entire calendar with SharePoint
  - Check all boxes

### Controlling Fields in Outlook

There are two ways to control what fields are displayed on the ProperSync pane within Outlook. For each connected list, one of these approaches can be taken to control the ProperSync fields.

Without any customizations, ProperSync will refer to the default view on the SharePoint list. ProperSync will show the selected columns in the order provided by the view.

List administrators have the option of creating a special view for ProperSync. If a list has a view with the term “[propersync]” (including square brackets) in the name, ProperSync will use that view instead of the default view on the list.

Notes:

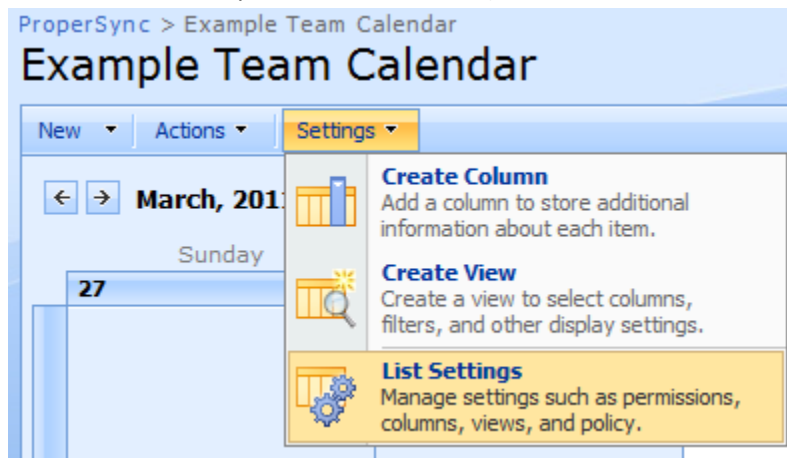
- All users connected to the list with ProperSync will see the same fields
- Updates to the list view will propagate to all users within ten minutes of the change (users must be online)

- ProperSync only shows custom fields on a list. Default columns will be ignored, as they are already in the Outlook form
- ProperSync only supports the selected columns and column order on a view. It does not currently support any other properties of the view (e.g. sort, filter, etc...). Future updates will improve upon this functionality

## Using the Default View of the List

### SharePoint 2007

- 1) Open a web browser and browse to the SharePoint list
- 2) From the **Settings** menu, select **List Settings** (if the settings menu is not present, the current user does not have correct permission to the list)



- 3) Scroll to the bottom of the page to see the Views on the list. The default view will be indicated with a checkmark

Views	
A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:	
View (click to edit)	Default View
All Events	✓
Calendar	

- 4) Click on the default view to see the selected columns

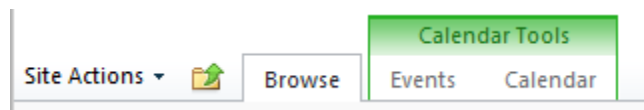
**Columns**  
 Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Recurrence	1
<input checked="" type="checkbox"/>	Attachments	2
<input checked="" type="checkbox"/>	Workspace	3
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	4
<input checked="" type="checkbox"/>	Location	5
<input checked="" type="checkbox"/>	Start Time	6
<input checked="" type="checkbox"/>	End Time	7
<input checked="" type="checkbox"/>	All Day Event	8
<input checked="" type="checkbox"/>	Modified	9
<input checked="" type="checkbox"/>	Modified By	10
<input checked="" type="checkbox"/>	Client Name	11
<input type="checkbox"/>	Content Type	12
<input type="checkbox"/>	Created	13
<input type="checkbox"/>	Created By	14
<input type="checkbox"/>	Deliverable Name	15
<input type="checkbox"/>	Description	16
<input type="checkbox"/>	Edit (link to edit item)	17
<input type="checkbox"/>	ID	18
<input type="checkbox"/>	Project Name	19

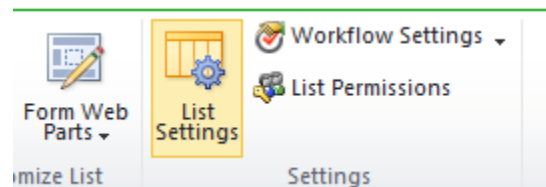
- The columns that are checked are the columns in the view. Any custom columns selected will appear in the ProperSync pane, in the order specified.
- Update and press **OK** to save the view.

### SharePoint 2010

- Open a web browser and browse to the SharePoint list
- Select **List (or Calendar)** tab from the SharePoint ribbon



- In the **Settings** section, click on **List Settings**



- Scroll to the bottom of the page to see the Views on the list. The default view will be indicated with a checkmark

**Views**

A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:

View (click to edit)	Default View
All Events	✓
Calendar	

5) Click on the default view to see the selected columns

**Columns**

Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

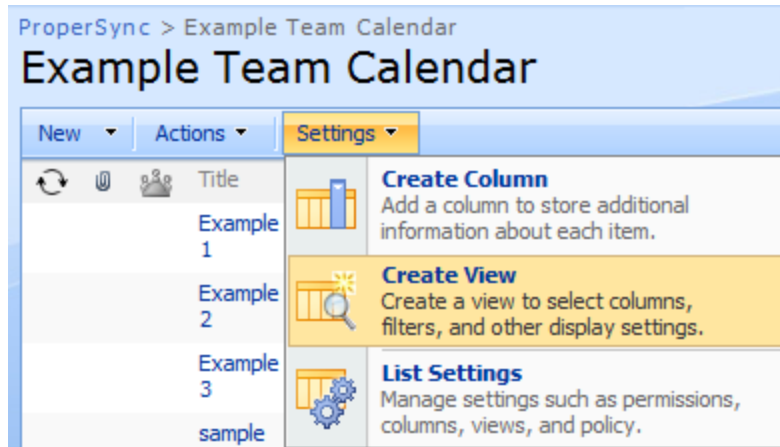
Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Recurrence	1 ▼
<input checked="" type="checkbox"/>	Attachments	2 ▼
<input checked="" type="checkbox"/>	Workspace	3 ▼
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	4 ▼
<input checked="" type="checkbox"/>	Location	5 ▼
<input checked="" type="checkbox"/>	Start Time	6 ▼
<input checked="" type="checkbox"/>	End Time	7 ▼
<input checked="" type="checkbox"/>	All Day Event	8 ▼
<input checked="" type="checkbox"/>	Modified	9 ▼
<input checked="" type="checkbox"/>	Modified By	10 ▼
<input checked="" type="checkbox"/>	Client Name	11 ▼
<input type="checkbox"/>	Content Type	12 ▼
<input type="checkbox"/>	Created	13 ▼
<input type="checkbox"/>	Created By	14 ▼
<input type="checkbox"/>	Deliverable Name	15 ▼
<input type="checkbox"/>	Description	16 ▼
<input type="checkbox"/>	Edit (link to edit item)	17 ▼
<input type="checkbox"/>	ID	18 ▼
<input type="checkbox"/>	Project Name	19 ▼

- 6) The columns that are checked are the columns in the view. Any custom columns selected will appear in the ProperSync pane, in the order specified.
- 7) Update and press **OK** to save the view.

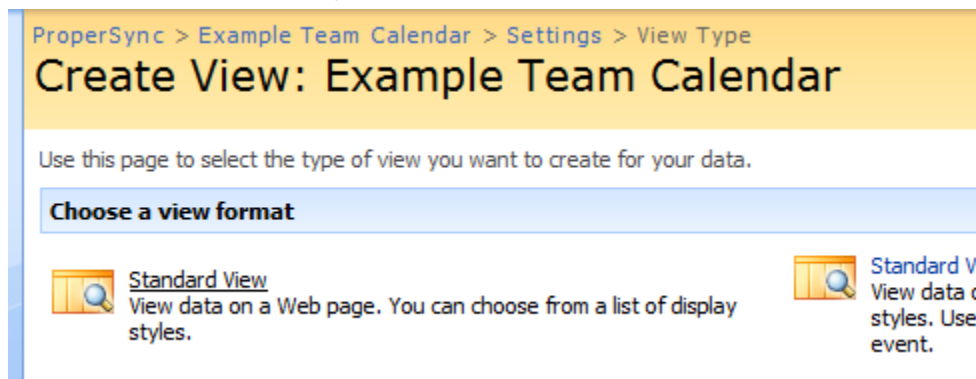
## Creating a [propersync] View

### SharePoint 2007

- 1) Open a web browser and browse to the SharePoint list
- 2) From the **Settings** menu, select **Create View** (if the settings menu is not present, the current user does not have correct permission to the list)



- 3) From the **Choose a view format** list, select **Standard View**



- 4) Give the view any name, but make sure to include the term “[propersync]” (including square brackets)

- 5) Check the columns to appear on the ProperSync pane. Reminder: ProperSync will only show custom columns on the list. Any selected standard columns will be ignored.

**Columns**

Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	1
<input type="checkbox"/>	Attachments	2
<input type="checkbox"/>	Workspace	3
<input type="checkbox"/>	Title (linked to item with edit menu)	4
<input type="checkbox"/>	Location	5
<input type="checkbox"/>	Start Time	6
<input type="checkbox"/>	End Time	7
<input type="checkbox"/>	All Day Event	8
<input checked="" type="checkbox"/>	Client Name	9
<input type="checkbox"/>	Content Type	10
<input type="checkbox"/>	Created	11
<input type="checkbox"/>	Created By	12
<input checked="" type="checkbox"/>	Deliverable Name	13
<input type="checkbox"/>	Description	14
<input type="checkbox"/>	Edit (link to edit item)	15
<input type="checkbox"/>	ID	16
<input type="checkbox"/>	Modified	17
<input type="checkbox"/>	Modified By	18
<input checked="" type="checkbox"/>	Project Name	19

6) Select the order in which you would like the columns to appear on the ProperSync pane

**Columns**

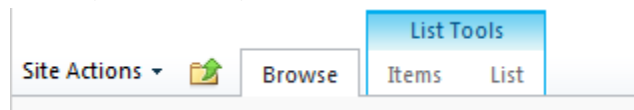
Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	4
<input type="checkbox"/>	Attachments	5
<input type="checkbox"/>	Workspace	6
<input type="checkbox"/>	Title (linked to item with edit menu)	7
<input type="checkbox"/>	Location	8
<input type="checkbox"/>	Start Time	9
<input type="checkbox"/>	End Time	10
<input type="checkbox"/>	All Day Event	11
<input checked="" type="checkbox"/>	Client Name	1
<input type="checkbox"/>	Content Type	2
<input type="checkbox"/>	Created	3
<input type="checkbox"/>	Created By	4
<input checked="" type="checkbox"/>	Deliverable Name	5

7) Press **OK** to save the list view

### SharePoint 2010

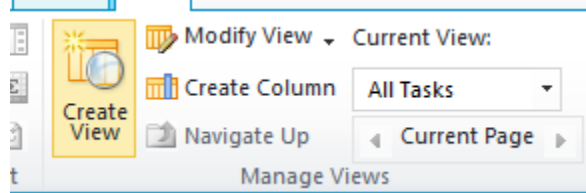
- 1) Open a web browser and browse to the SharePoint list
- 2) Select **List (or Calendar)** tab from the SharePoint ribbon



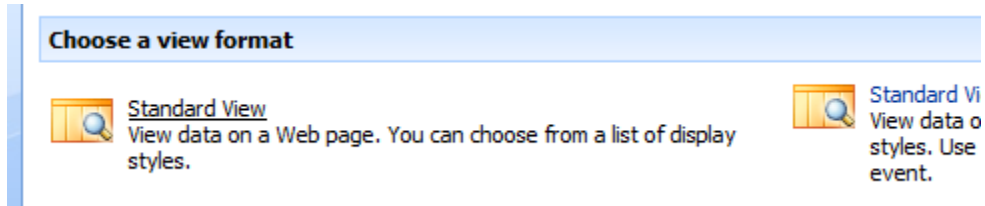




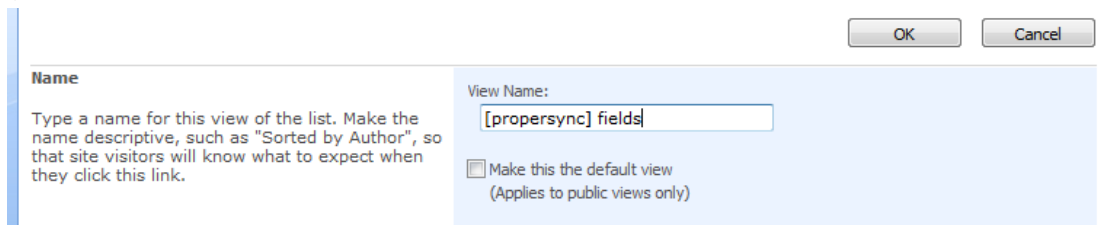
- 3) In the **Manage Views** section, click on **Create View**



- 4) From the **Choose a view format** list, select **Standard View**



- 5) Give the view any name, but make sure to include the term "[propersync]" (including square brackets)



- 6) Check the columns to appear on the ProperSync pane. Reminder: ProperSync will only show custom columns on the list. Any selected standard columns will be ignored.

**Columns**  
 Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	1 ▼
<input type="checkbox"/>	Attachments	2 ▼
<input type="checkbox"/>	Workspace	3 ▼
<input type="checkbox"/>	Title (linked to item with edit menu)	4 ▼
<input type="checkbox"/>	Location	5 ▼
<input type="checkbox"/>	Start Time	6 ▼
<input type="checkbox"/>	End Time	7 ▼
<input type="checkbox"/>	All Day Event	8 ▼
<input checked="" type="checkbox"/>	Client Name	9 ▼
<input type="checkbox"/>	Content Type	10 ▼
<input type="checkbox"/>	Created	11 ▼
<input type="checkbox"/>	Created By	12 ▼
<input checked="" type="checkbox"/>	Deliverable Name	13 ▼
<input type="checkbox"/>	Description	14 ▼
<input type="checkbox"/>	Edit (link to edit item)	15 ▼
<input type="checkbox"/>	ID	16 ▼
<input type="checkbox"/>	Modified	17 ▼
<input type="checkbox"/>	Modified By	18 ▼
<input checked="" type="checkbox"/>	Project Name	19 ▼

- 7) Select the order in which you would like the columns to appear on the ProperSync pane

**Columns**  
 Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	4 ▼
<input type="checkbox"/>	Attachments	5 ▼
<input type="checkbox"/>	Workspace	6 ▼
<input type="checkbox"/>	Title (linked to item with edit menu)	7 ▼
<input type="checkbox"/>	Location	8 ▼
<input type="checkbox"/>	Start Time	9 ▼
<input type="checkbox"/>	End Time	10 ▼
<input type="checkbox"/>	All Day Event	11 ▼
<input checked="" type="checkbox"/>	Client Name	1 ▼
<input type="checkbox"/>	Content Type	2
<input type="checkbox"/>	Created	3
<input type="checkbox"/>	Created By	4
<input checked="" type="checkbox"/>	Deliverable Name	5

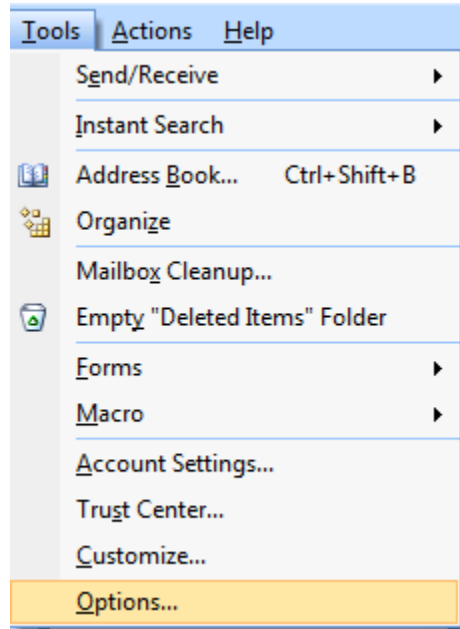
- 8) Press **OK** to save the list view

## ProperSync Options

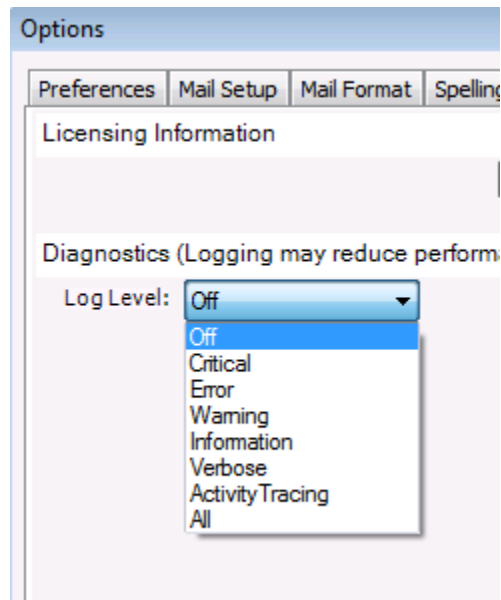
### Enabling Logging

#### Outlook 2007

- 1) Open Microsoft Outlook 2007
- 2) From the **Tools** menu select **Options**



- 3) From the **Options** dialog box select the **ProperSync** tab
- 4) From the **ProperSync** tab use the **Log Level** dropdown to choose the type of logging you require.



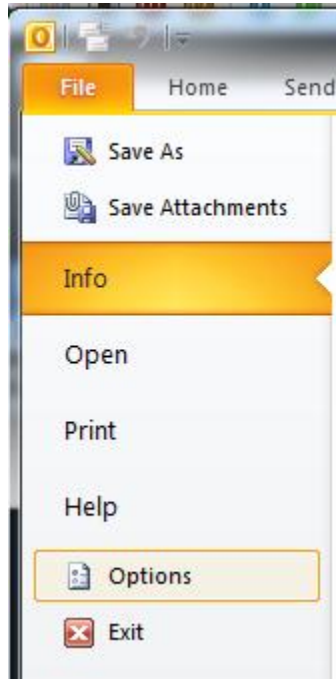
- a. 5) Once the logging level has been set, press OK to apply the settings

### *Outlook 2010*

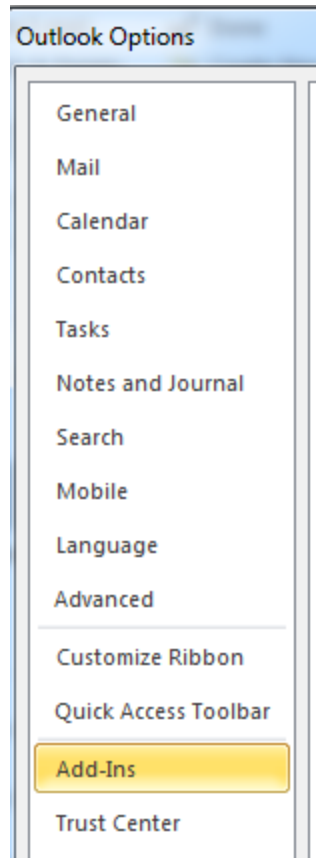
- 1) Open Microsoft Outlook 2010
- 2) **Click** on the **File** button



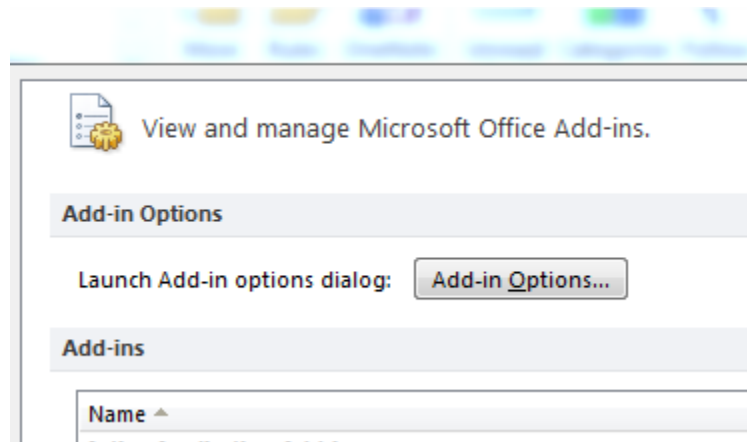
- 3) From the **File** menu select **Options**



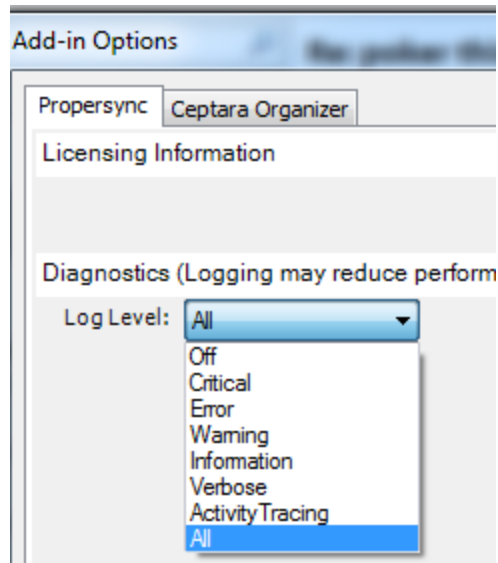
- 4) From the **Options** dialog box select **Add-ins**



- 5) From the Add-ins sections select **Add-in Options...**



- 6) From the **Add-ins Options** dialog box select the **ProperSync** tab
- 7) From the **ProperSync** tab use the **Log Level** dropdown to choose the type of logging you require.



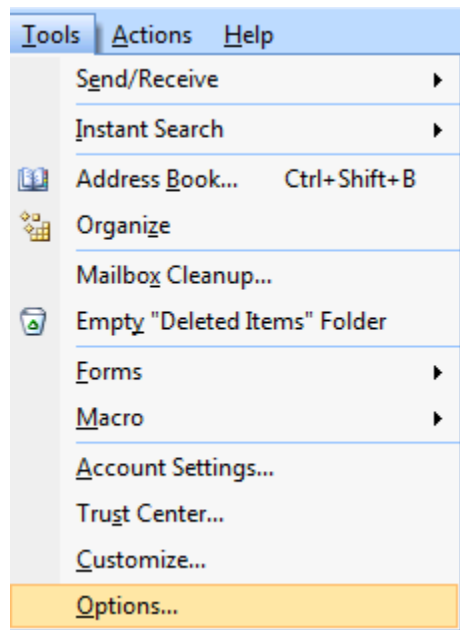
a.

- 8) Once the logging level has been set, press **OK** to apply the settings

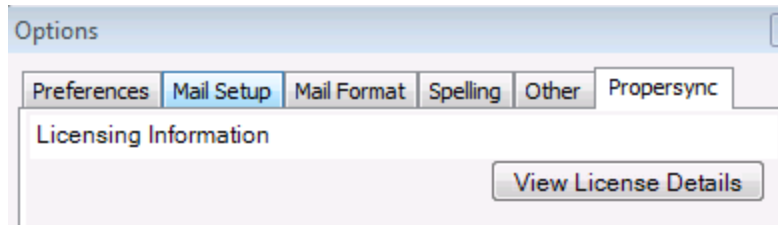
## Updating/Changing Activation Key

### Outlook 2007

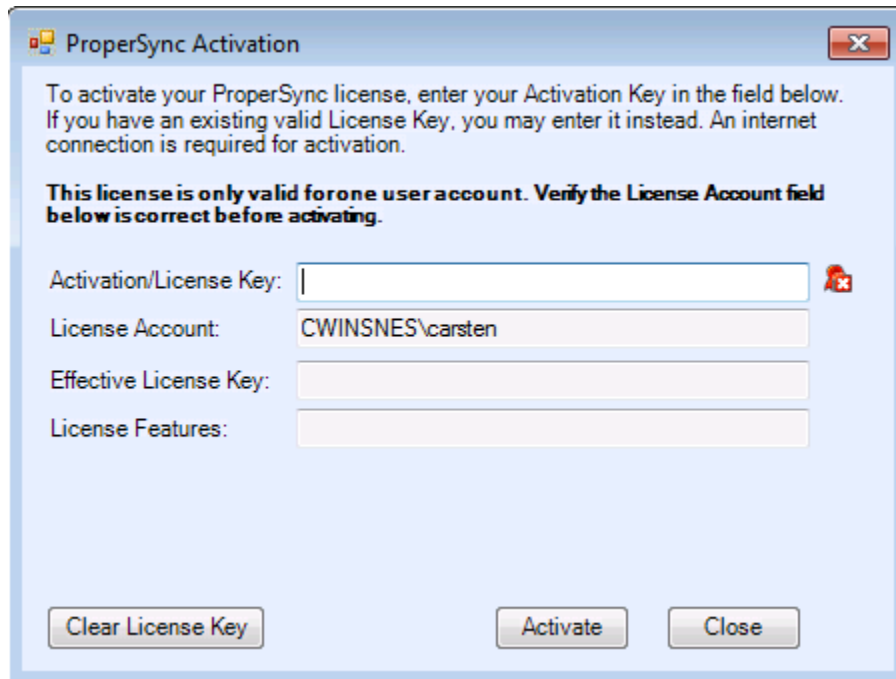
- 8) Open Microsoft Outlook 2007
- 9) From the **Tools** menu select **Options**



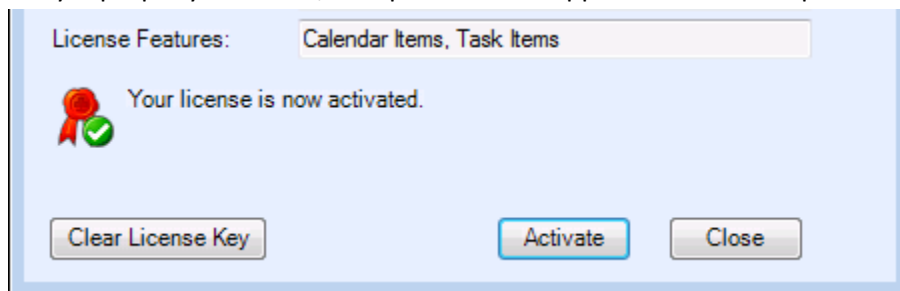
- 10) From the **Options** dialog box select the **ProperSync** tab
- 11) From the **ProperSync** tab select **View License Details**



- 12) The **Propersync Activation** window will open. Enter the new or updated **license key** in the **Activation/License Key** box, then press **Activate**.



- 13) Once the key is properly activated, a response will be appear in the blank space



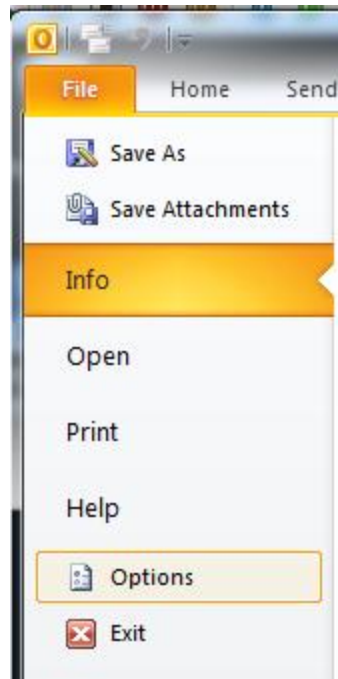
- 14) Click **Close** to close the **Propersync Activation** dialog box

## Outlook 2010

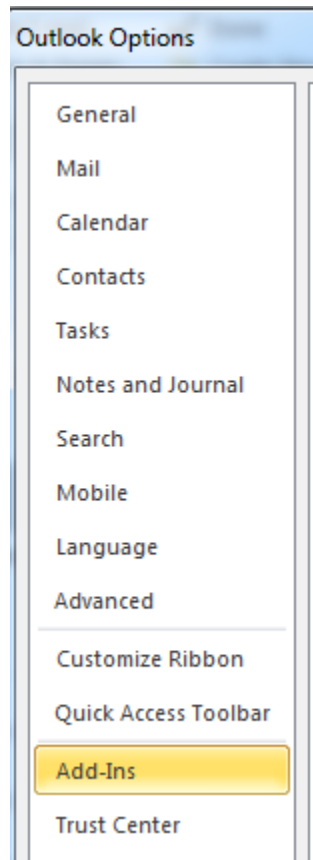
- 11) Open Microsoft Outlook 2010  
12) Click on the **File** button



- 13) From the **File** menu select **Options**

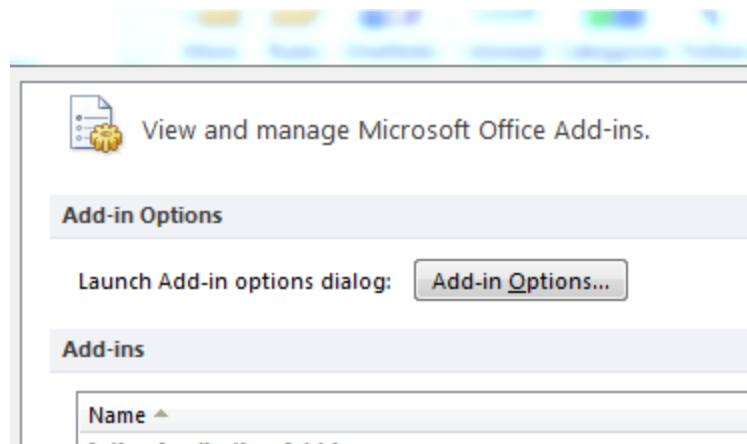


14) From the **Options** dialog box select **Add-ins**



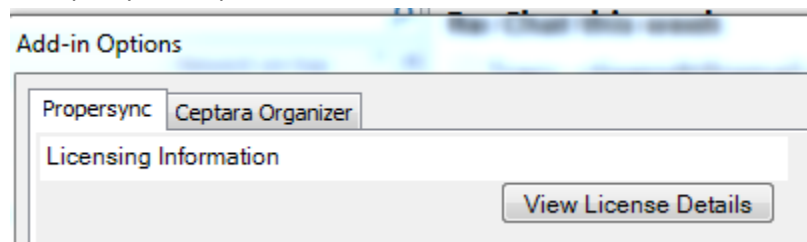
15) From the Add-ins sections select **Add-in Options...**



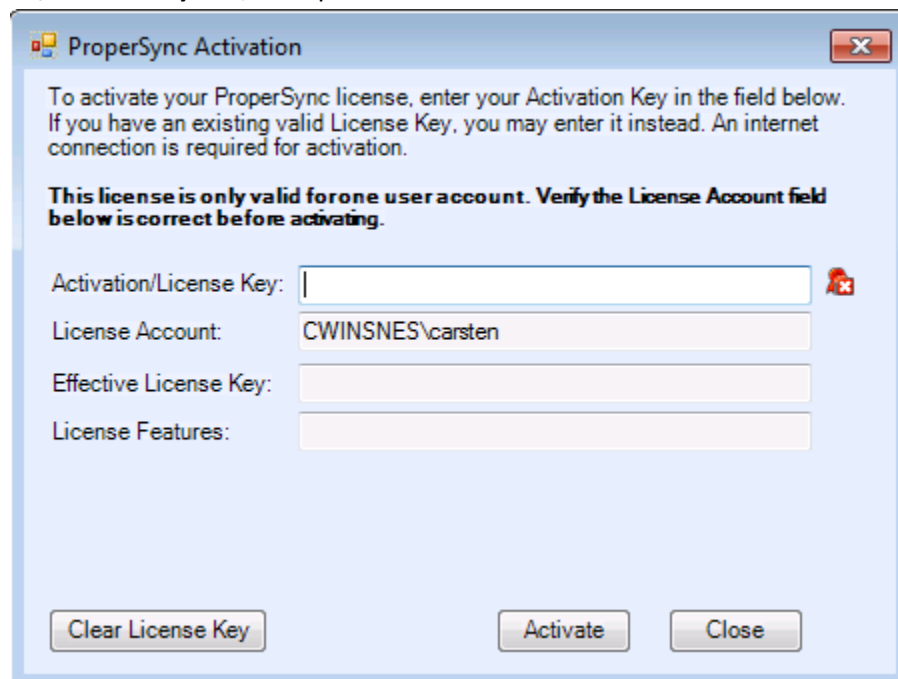


16) From the **Add-ins Options** dialog box select the **ProperSync** tab

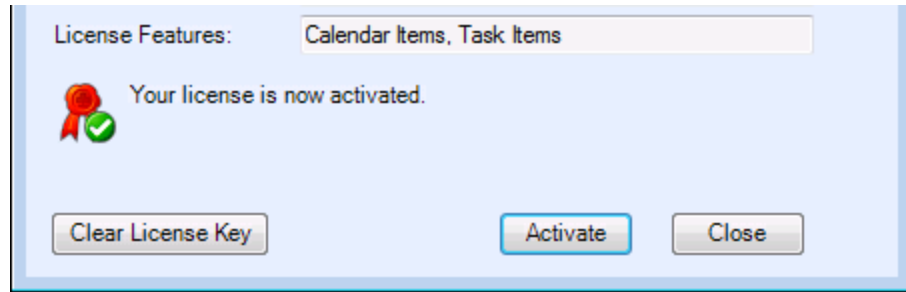
17) From the ProperSync tab press the **View License Details** button



18) The **ProperSync Activation** window will open. Enter the new or updated **license key** in the **Activation/License Key** box, then press **Activate**.



19) Once the key is properly activated, a response will be appear in the blank space



20) Click **Close** to close the **ProperSync Activation** dialog box